Oracle® Fusion Applications Marketing, Campaigns Guide

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Oracle® Fusion Applications Marketing, Campaigns Guide

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Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.

With a local installation of help, you can add custom help files to replace or supplement the provided content. Help content patches are regularly made available to ensure you have access to the latest information. Patching does not affect your custom content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. You can access the guides from the **Guides** menu in the global area at the top of Oracle Fusion Applications Help pages.

Note
The **Guides** menu also provides access to the business process models on which Oracle Fusion Applications is based.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.
- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.
- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief

financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

To supplement these guides, which cover specific business processes and offerings, the following guides address common areas:

Other Information Sources

My Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit or visit if you are hearing impaired.

Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.

Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides visibility into service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes. In Oracle Fusion Applications, you can use the Oracle Enterprise Repository for Oracle Fusion Applications for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.
- Publishing other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

The Oracle Fusion Applications information is provided as a solution pack that you can upload to your own deployment of Oracle Enterprise Repository for Oracle Fusion Applications. You can document and govern integration interface assets provided by Oracle with other assets in your environment in a common repository.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww@oracle.com. You can use the **Send Feedback to Oracle** link in the footer of Oracle Fusion Applications Help.

1

Define Segmentation Strategy

Marketing Segments and Segment Trees: Highlights

Segmentation is the practice of dividing a customer base into groups that are similar in specific ways such as demographics or past purchases. Marketers use segmentation to target groups of customers and allocate marketing resources effectively. Segments and segment trees are selected in marketing campaigns to receive marketing communications and to generate leads. Marketing Segmentation supports the creation and management of segments and segment trees.

Manage Marketing Segments

- For information about marketing segments and segment trees, see the Using Marketing Segments and Segment Trees chapter in the Marketing Segmentation Guide.

List Types: Explained

A marketing list is categorized by a list type. Some list types have very specific uses and others are used to organize lists into categories, for reference.

Because the available list types are defined in an extensible lookup, your application administrator can create more list types as needed.

The standard list types, discussed in this topic, are:

- Seed
- Subscription
- Imported
- Internal

Seed Lists

Seed lists can be associated with a treatment and used to test the quality of a treatment or a campaign. They typically contain employees of your enterprise.

Seed list members will receive the marketing content whenever the treatment is tested or the campaign is launched.

Subscription Lists

Subscription lists are used to group contacts who will periodically receive marketing materials. When associated with a treatment whose content contains subscribe and unsubscribe response forms, the subscription list is updated whenever an e-mail recipient responds.

Imported Lists

An **Import List** type identifies a new list created when defining an import activity for leads and responses. When the import activity is processed, the lead or response contacts are added to the list. A marketing list with this type can be selected as a target audience in campaigns.

Internal Lists

An internal list is a grouping of selected existing contacts that you compile manually. A marketing list with this type can be selected as a target audience in campaigns.

What's the difference between a marketing list and a list in Marketing Segmentation?

A marketing list that you import or create is a static list of contacts.

A list, as described in the Marketing Segmentation guide, is the formatted output of the dynamic selection of contacts based on segmentation rules associated with the campaign's segments and segment trees.

Marketing Segmentation lists can have the following formats:

- Campaign Load Formats. Used to load the members of a segment or a segment tree to the campaign during campaign execution.
- Data Load Formats. Used to import leads resulting from a lead generation stage of a multistage campaign.
- List Export Formats. Used for campaign distribution lists, such as a direct mail list for a marketing fulfillment supplier. The list contains information about the members of a segment or segment tree, such as the contact name and address.
- E-Mail Server Formats. Used to export the relevant data for each member of an e-mail campaign to the marketing E-Mail Server.

2

Identify Sales Prospects and Target Products

Sales Targeting Data Visibility: Explained

The Opportunity Landscape application is used by salespersons to identify sales targets and to help them achieve both short and long term sales goals. Sales targeting enables visual analysis for leads and supporting information for your top customers and products.

This topic discusses information sources and what impacts the data available for viewing.

Data Sources

The Transactional Business Intelligence repository stores information displayed for sales targeting including data from the following sources:

- Leads generated by Sales Prediction Engine
- Marketing leads
- Sales accounts
- References and competitors
- Sales catalog products and product groups
- Customer install base products

Updates to the information stored in the repository typically occur at regular intervals scheduled by your administrator. If enabled, data warehousing information is also used for some analysis criteria filtering options.

Available Data

The data available for viewing and analysis in sales targeting is impacted by the following areas:

Area	Overview
Base Set by Territories and Profiles	The set of products and customers you have access to is defined by your territories and the eight profile option settings that include the minimum and maximum range for a specified attribute and the top product and sales account thresholds. If the base set of products and customer sales accounts is still above the count threshold, you are prompted to enter further criteria to reduce the amount of customers and products to display for your analysis.

Leads	Sales Prediction Engine recommends possible leads based on predictive modeling and rules. Each recommended lead is for one combination of customer sales account and product or product group. Marketing leads include open, direct sales channel leads. The estimated revenue amount corresponds to the primary product or product group associated with the lead. **Note** If the Estimated Revenue Display analysis criterion is set to view both Recommended and Marketing leads, it is possible that the combination of customer and product or product group exists for both sources resulting in the double counting of that particular deal.
Product Hierarchy	The heat maps display a product hierarchy that can be expanded and collapsed. The top level node in the hierarchy is determined by starting with the base set of products and traversing up the sales catalog hierarchy to the highest common category. For example, a base set of products belong to the printers, servers, computers, and business software product categories. These four categories are grouped in the sales catalog under the hardware and software categories. The hardware and software categories are further grouped under the technology category. As the highest common category, technology is the top level node displayed in the heat maps. In this same example, the software category has two other product lines that include games and consumer software. Since products in the games and consumer software categories are not part of the base set of products, these two categories will not appear when expanding the software category.
Analysis Criteria	Customer and Product analysis filtering refocuses the base set of leads displayed in the heat maps and sales targeting list to only those customers and products that meet the specified filtering criteria. For example, if there is only one lead recommending a printer for customer ABC and the Product analysis criteria is adjusted in a way that excludes the printer product, the column in the heat maps identifying the printer will no longer display. If the printer was the only product displayed for a product category, the category will no longer display. In the same example, if the lead recommending the printer was the only lead displayed for the customer, the customer row will also be removed from the heat maps.

Competitive Landscape	The competitive count is based on the product and customer selection and determines the top five competitive names individually listed in the legend. Competitors that are not part of the top five are grouped into the Other category. You can view the heat map by various combinations of competitors by selecting or deselecting the legend values.

Sales Targeting Navigation Hints: Explained

Opportunity Landscape is an interactive tool that assists with identifying and initiating the pursuit of sales leads. While analyzing sales targets, you can view and refocus three heat maps, view an overall sales targeting list and multiple varieties of prospecting summaries, accept recommended leads, and create sales campaigns.

This topic discusses some navigation hints for using:

- Heat maps
- Search
- Sales Targeting List and Prospecting Summaries

Heat Maps

Heat maps respond to the analysis criteria filtering selections you make. You can also interact with heat maps by using your mouse to collapse and expand icons and right-click to view action menus.

Heat Map Elements	Navigation
Product Hierarchy	The heat maps display a product hierarchy that supports up to ten levels. Each level can be expanded and collapsed. Expand to the final level, right-click on the product column, and select the View Detail menu to navigate to the Product prospecting summary.
Customers	Right-click on a single customer from any heat map and select the View Details action to navigate to the Customer prospecting summary. This summary also includes supporting install base and competitor information.

Estimated Revenue Heat Map Cells	Right-click on a single cell to navigate to the View Detail menu. If the cell is associated with a product category, the View Detail action navigates to the Customer and Product Category prospecting summary. This summary provides a list of leads for the set of products within the category. If the selected cell is associated with a single product, the View Detail action navigates to the Customer and Product prospecting summary. This summary provides a list of potential customer references by customer size and industry, and recommendation rational for leads originating from the Sales Prediction Engine application. If the single cell that you right-click represents an unaccepted lead, then an Accept action updates you as the lead owner and places the lead in your queue for follow up. Select one or multiple cells, using the keyboard short cut of Ctrl plus left-click or Shift plus left-click. Once selected, right-click and select the Create Sales Campaign action to take you to the Sales Campaign page. Customer contacts and products for the leads associated with the selected cells are already available from here.
Competitive Landscape	To view the heat map results by various combinations of competitors, deselect or select the legend values at the top of the heat map. Heat map cells that contain a number indicate that the customer has more than one competitor listed. Using you mouse, hover over the number to view a break down based on the selected legend values. **Note** Expanding and collapsing the product hierarchy can change the relative competitive presence. This causes the top competitors to be determined again. After changing the focus in the product hierarchy, review the heat map legend to identify the competitors and corresponding heat map colors.

Search

You can expand your search options to:

- Search for a single customer account to navigate to the Customer prospecting summary
- Search for a single product to navigate to the Product prospecting summary
- Search for both customer account and product and navigate to the Customer and Product summary

Sales Targeting List and Processing Summaries

The Sales Targeting List and various prospecting summaries provide links, an Actions menu, and a Details column with corresponding icon that navigates to Customer and Product prospecting summary. Select one or more rows and the

Accept Leads or **Create Sales Campaigns Action** menu to accept leads or create a sales campaign in any of the following:

- Sales Targeting List tab
- Customer prospecting summary, Leads view
- Product prospecting summary
- Customer and Product Category prospecting summary
- Customer and Product prospecting summary

The customer and product names in the Sales Targeting List include links to navigate to the corresponding prospecting summaries. The Customer Details link in several prospecting summary overview sections navigates to the Customer Center view for the specific customer.

The following table provides the navigation options to the prospecting summaries:

Navigation	Customer	Product	Customer and Product	Customer and Product Category
Search: Customer	Y			
Search: Product		Y		
Search: Customer and Product			Y	
Heat Maps: Customer right-click, View Detail	Y			
Heat Maps: Product right-click, View Detail		Y		
Estimated Revenue heat map: Customer and Product cell right-click, View Detail			Y	
Estimated Revenue heat map: Customer and Product Category cell right-click, View Detail				Y
Sales Targeting List: Customer column, Customer link	Y			
Sales Targeting List: Product column, Product link		Y		
Sales Targeting List: Details column, Details icon			Y	
Customer prospecting summary: Details column, Details icon			Y	

Product prospecting summary: Details column, Details icon			Y	
Customer and Product prospecting summary: Details column, Details icon			Y	

Sales Targeting Customer Criteria: Explained

Sales account analysis filtering refocuses the base set of recommended leads displayed in the heat maps and sales targeting list to only those accounts that meet the specified filtering criteria.

Use customer analysis criteria to see what affect filtering various customer sales accounts have on the sales targeting analysis.

Base set of customer sales accounts

Analysis criteria filter a base set of sales accounts collected using the following:

- Territories: The set of sales accounts that you have access to as defined by your territories.
- Profile values: The set of sales accounts that you have access to is limited by profile options that can be set for the minimum and maximum range for a specified attribute, and the top sales accounts for sales targeting threshold.

If the customer count is still above the threshold, you are prompted to enter further criteria to reduce the number of sales accounts used in your analysis.

Customer filters

With the exception of company size, customer size category, and customer industry, the customer criteria filter data is stored in the Transactional Business Intelligence repository. For product-related filters, all installed products are considered, unlimited by territories.

If the Data Warehouse profile option is not enabled, then only a subset of the customer filtering options are available.

Filter Name	Description
Company Size (Annual Revenue)	For viewing accounts with an annual revenue within a specified range, as entered on the sales account.
Company Size (Employees)	For viewing customers with a number of employees value within a specified range, as entered on the sales account.
Number of Open Service Requests	For viewing sales accounts with a number of open service requests within a specified range.

Installed Base	For viewing customers with a total amount of existing products and services in the installed base within a specified range.
Total Lead Deal Size	For viewing customers with a sum of primary product values for open leads within a specified range.
Number of Contacts	For viewing customers with a number of contacts within a specified range. Hint: To include a customer in a sales campaign, the customer must have at least one contact.
Number of Times Contacted Last Month	For viewing customers with the number of recorded outbound interactions in the past month within a specified range.
Number of Products Owned	For viewing customers with a total number of existing products and services in the installed base within a specified range.
Days Since Last Purchase	For viewing customers where the most recent product added to the installed base is within a specified number of days range.
Days Since Last Contacted	For viewing customers where the most recent outbound interaction with a contact associated with that sales account occurred within a specified number of days range.
Competitor Product Purchased	For viewing only those customers which have at least one known competitor product purchase.
Customer Industry	For viewing customers defined with a primary industry included in the selected industries.
Products Owned	For viewing customers which have an existing installed base that includes one or more of the selected products.
Last Purchased Product	For viewing customers where the most recent product added to the installed base is the specified product.
Customer Size Category	For viewing customers with a customer size that falls within the selected category.

Customer filter impact

Filtering customers removes or adds back customers in the heat map rows, sales target lead list, and customers in the detailed product view. If a sales account no longer meets the filtering criteria, the customer is removed along with the leads for that sales account.

Sales Targeting Product Criteria: Explained

Product analysis filtering refocuses the base set of recommended leads displayed in the heat maps and sales targeting list to only those products and product groups that meet the specified filtering criteria.

Use product analysis criteria to see what affects filtering various products have on the sales targeting analysis.

Base set of products

Analysis criteria filter a base set of products collected by using the following:

- Territories: The set of products that you have access to as defined by your territories.
- Sales Catalog: The set of products that you have access to as defined by your territories and that are included in your sales catalog.
- Profile values: The set of sales catalog products that you have access to limited by the four profile option settings for the minimum and maximum range for a specified attribute and the top sales products for sales targeting threshold.

If the product count is still above the threshold, you are prompted to enter further criteria to reduce the number of products used in your analysis.

Product filters

With the exception of the product group, the product criteria filter data is stored in the Transactional Business Intelligence repository. The stored data is at a per product level. Amounts, last purchase, and counts are across all owning customers, unlimited by territories.

If the Data Warehouse profile option is not enabled, then only a subset of the product filtering options are available.

Filter Name	Description
Number of References	For viewing products for which there are a total number of unique potential customer references within a specified range.
Number of Customers Owning Product	For viewing products for which the number of customer accounts owning the product is within a specified range.
Installed Base	For viewing products with a total amount for the existing customer base within a specified range.
Total Lead Deal Size	For viewing products with a sum of primary product values for leads within a specified range.
Days Since Product was Last Purchased	For viewing products for which the most recent product added to the existing customer base is within a specified numbers of days range.
Product Group	For viewing product groups included in the selected product groups.

Product filter impact

Filtering products removes or adds back products in the heat map columns, sales target lead list, and products in the detailed customer view. If a product no longer meets the filtering criteria, the product is removed along with the leads for that product. When viewing heat maps at a product category level in the hierarchy displayed in the heat maps, adjusting a product attribute filter can change the darkness of various cells and potentially reorder the customer rows depending upon the sorting criterion in place.

Sales Targeting Lead Criteria: Explained

Lead analysis filtering refocuses the base set of recommended and marketing leads displayed in the heat maps and sales targeting list to only those leads that meet the specified filtering criteria.

Use lead analysis criteria to see what affects filtering various leads have on the sales targeting analysis.

Base set of leads

Analysis criteria filter the recommended and open marketing, direct sales channel leads for the base set of products and customers. The base set of products and customers are collected using the following:

- Territories: The set of products and customers you have access to as defined by your territories.
- Sales Catalog: The set of products that you have access to as defined by your territories and that are included in your sales catalog.
- Profile values: The set of products and customer that you have access to limited by the four profile option settings for the minimum and maximum range for a specified attribute and the top sales products and top sale accounts for sales targeting thresholds.

If the product and customer counts are still above the threshold, you are prompted to enter further criteria to reduce the number of used in your analysis.

Lead filters

If the Data Warehouse profile option is not enabled, then only a subset of the lead filtering options are available.

Filter Name	Description
Recommendation Lead Type	For viewing leads by comparing the lead product with the list of products in the customer's installed base to evaluate new product opportunity and upgrade potential choices.
Likelihood to Buy	For viewing recommended leads with an estimated Likelihood to Buy and marketing leads with a Purchase Confidence value within a specified range.
Estimated Sales Cycle	For viewing recommended leads with an estimated sales cycle and marketing leads with days to close value within a specified number of days range.
Estimated Revenue	For viewing leads with an estimated average product total amount within a specified range.
Recommendation Lead Date Range	For viewing leads created within a specified date range.
Estimated Revenue Display	For viewing a choice of leads recommended by Sales Prediction Engine model or rule-based predictions, leads generated from marketing related sources, or both.

Marketing Lead Status	For viewing a choice of marketing leads with a lead status value of qualified, unqualified, or both.
Marketing Lead Accepted	For viewing a choice of marketing leads by an ownership indicator of accepted, unaccepted, or both.
Marketing Lead Rank	For viewing marketing leads with a rank value included in the selected rank values. The lead rank indicates a measure of lead quality and prioritization.
Marketing Lead Score	For viewing marketing lead, score assignments within a specified range.

Lead filter impact

Filtering leads removes or adds back leads to the sales targeting lead list, detailed customer view, detailed product view, and combined detailed customer and product view. Depending on what sorting criterion is in place in the estimated revenue heat map, any adjustment in a lead filter can change the darkness of various cells and potentially reorder the customer rows.

Exploring Short Term, High Revenue Leads: Worked Example

Acme Technologies is a global high tech company that manufactures and sells computers, printers, servers and related software and services. It is the start of a new fiscal year and the company is releasing a new line of eco-friendly servers that enable customers to reduce energy consumption, improve operational efficiency, and reduce the size of their server footprint in the data center. The goal is to explore the revenue potential of their new servers in the marketplace using predictive modeling to identify the overall potential and to leverage the experience of their sales team to determine which customer accounts to sell the product to. The marketing department has prepared a sales kit which includes the names of marketing content templates and product brochures that can be used when creating sales campaigns.

John is a salesperson and uses Sales Targeting to analyze the leads recommended by Sales Prediction Engine for his territory. He wants to determine:

- Which accounts he should pursue in the short term with the highest revenue potential and lowest risk?
- How can he most efficiently leverage the sales kits to meet his short term goals?

John will review and adjust the filtering criteria for the estimated revenue heat map to identify customers with the largest revenue potential. He will use the competitive landscape heat maps to help him understand existing competitor challenges. He will create sales campaigns using the materials provided in the sales kits.

Analyze Overall Potential by Product Group

1. John navigates to the Identify Sales Targets page.

2. He clicks the expand icon for the sales catalog in the Estimated Revenue heat map to display the five main product categories.
3. He continues to drill down the server sales catalog hierarchy using the expand icon until he locates the new product line.
4. He reviews the overall recommended potential for the new products.

   Now that John is familiar with where the new product line fits within the overall sales catalog, the next time he returns to analyze this product line, he will navigate to the product analysis criteria and select the specific product group to have the heat map automatically refocus for that group of products.

Analyze Short Term Potential

To focus on short term potential:

1. John adjusts the following lead analysis criteria:
   - Decreases maximum estimated sales cycle
   - Increases minimum likelihood to buy
   - Increases minimum estimated revenue
2. The Estimated Revenue heat map refocuses to list the accounts predicted to purchases the new products in the shortest amount of time with top revenue potential.

Analyze Competition

1. To help John understand his competition, he reviews the Competitive Landscape heat map.

   In John's experience, he has been able to win deals when competing against Advanced Services company, plus his marketing department has included a marketing message template that compares the new server line with similar products sold by Advanced Services.
2. John deselects the other competitors and discovers 6 customers that are known to have an Advanced Services product.

Accept Leads and Create Sales Campaigns

1. John navigates to the Lists tab which displays the leads meeting his specific analysis filtering criteria.
2. He selects the 6 rows for the leads where the customers had at least one known Advanced Services product.
3. He selects the Accept Leads action to indicate he will be pursuing these leads, followed by the Create Sales Campaign action.
4. He completes the steps to create the sales campaign, including choosing the template indicated in the sales kit that details how the new set of products measure up against the competition and attaching product related brochures.

John returns to the List tab to select all other rows, accepts the leads and creates a second sales campaign.

1. John completes the steps to create the sales campaign using another marketing content template and attaches the product brochures.

   John remembers speaking to Carol, a customer contact, about the upcoming release of the new server product line.

2. He enters a personalized text merge field followed by a personalized message for Carol that will be included in her sales campaign e-mail.
3. He adds a follow-up action that will notify him every time a customer contact responds to the campaign and he schedules the campaign for immediate e-mail delivery.

FAQs for Identify Sales Prospects and Target

What's the difference between sales targeting and source application data?

Most of the information displayed for sales targeting is based on data stored in the Transactional Business Intelligence repository. Updates to the repository typically occur at regular intervals scheduled by your administrator. Changes made in the source applications will not be reflected in Sales Targeting until after the update to the repository has completed. For example, changes to products in the sales catalog are reflected once the sales catalog information has been updated in the Transactional Business Intelligence repository. Similarly, the action to accept leads in Sales Targeting immediately updates the leads in the Lead Management application. The leads will still appear as unaccepted in Sales Targeting until the next scheduled repository update occurs for Lead Management.

3

Implement Marketing Content

Marketing Promotions and Coupons: Explained

Promotion names and associated coupon codes provide tracking for offers extended to customers.

This topic includes the following:

- Promotions, Coupons, and Marketing Treatments
- Promotions and Mini Campaigns
- Promotions, Coupons, and Source Codes
- Promotions, Coupons, and Marketing Responses

Promotions, Coupons, and Marketing Treatments

You can add promotion names and selective coupon codes to a treatment, where you design the promotional message and coupon content. You allocate the treatment to specific customer segments or lists of contacts when designing your multistage campaign. You can design one treatment per promotion, per coupon, or combinations of promotions and coupons. You can also assign promotions and coupons to more than one treatment.

Promotions and Mini Campaigns

You can add promotion names to your mini campaign, where you design the promotional message and coupon content to be delivered to the customer segments and lists of contacts selected for the campaign. You can design one mini campaign per promotion or multiple promotions, all coupons for the selected promotion are automatically included. You can also design many mini campaigns using the same promotion.

Promotions, Coupons, and Source Codes

A marketing source code is a unique identifier that represents a campaign or marketing activity and is used to track marketing effectiveness. While a source code does not represent individual promotions or coupons, it does represent the campaign stage instance, audience segment or list, and treatment combination of a multistage campaign, and the instance, campaign content, and audience segment or list combination of a mini campaign.

To view a listing of source codes and associated campaign components, navigate to the Review Marketing Source Codes task in Functional Setup Manager. Note that a source code can be listed more than once in this page to support querying on the related promotions and coupons.

Promotions, Coupons, and Marketing Responses

You can provide a source code when creating, editing, or importing a marketing response. A response generated as a result of an e-mail campaign trackable URL or an e-mail bounce inherits the source code derived from the originating e-mail marketing campaign

By providing a source code on the marketing response, associated promotions and coupons are also added as informative information on the response. You can search responses by promotion name and coupon code.

Defining Treatments: Explained

A treatment includes a channel specific marketing message for targeted audience members and delivery options for third party suppliers. You can tailor the content and attach marketing collateral to personalize a treatment for a specific segment.

Treatments can have the following components:

- Products and Promotions
- Personalization Elements
- Distribution Options
- Associated Lists
- Confirmation E-Mails
- Content and Attachments

Products and Promotions

You can associate products and product groups with treatments, and use the available collateral for these products when creating the treatment content. You can associate time-limited promotions and coupons codes with a treatment to support tracking for offers extended to customers.

Personalization Elements

E-mail personalization formats are defined in Marketing Segmentation, and are available to use in treatments as merge fields. You can personalize the e-mail message sent to each recipient by adding merge fields to treatments.

Distribution Options

If using a supplier to fulfill your marketing campaign, you can choose the supplier and the supplier's distribution profile. The distribution profile provides instructions for creating and delivering campaign information to the supplier when the campaign is launched.

Associated Lists

You can associate a seed list, a static list of internal employees, who will receive the same campaign information as your external recipients. Use the seed list to verify the quality of service that the supplier is providing to your company.

A subscription list associated with a treatment is the list of contacts that is updated as e-mail recipients respond to the subscribe and unsubscribe links included in the treatment content. A subscription list can be associated with multiple treatments.

Confirmation E-Mails

When confirmation of subscription and unsubscription is required, you must have three treatments. To illustrate this requirement, consider the following example of three treatments referred to here as Treatment One, Treatment Two, and Treatment Three.

Treatment One offers recipients the options to request subscription or unsubscription. Those who respond will receive a second e-mail where they can finalize their request. Although Treatment One is the first treatment to be sent, it is the last that you create, since it refers to the other two treatments. The following table shows the required values.

Treatment Step	Attribute	Value
Treatment Details	Channel	E-mail
Channel Details, Confirmation E-Mails	Confirm-in Treatment	Select the treatment to send to recipients as a result of clicking on the **Subscribe confirmation request** link included in the e-mail content. In this example, select Treatment Two.
Channel Details, Confirmation E-Mails	Confirm-out Treatment	Select the treatment to send to recipients as a result of clicking on the **Unsubscribe confirmation request** link included in the e-mail content. In this example, select Treatment Three.
Content	Response Forms	Subscribe confirmation request Unsubscribe confirmation request

Treatment Two provides the subscribe confirmation request to recipients as a result of clicking on the **Subscribe confirmation request** link included in the e-mail content of Treatment One. Recipients who respond to this treatment are added to the subscription list associated with this treatment. The following table shows the required values.

Treatment Step	Attribute	Value
Treatment Details	Channel	E-mail confirmation in
Channel Details, Associated Lists	Subscription List	Select a list
Content	Response Forms	Subscribe to list

Treatment Three provides the unsubscribe confirmation request to recipients as a result of clicking on the **Unsubscribe confirmation request** link included in the e-mail content of Treatment One. Recipients who respond to this treatment are removed from the subscription list associated with this treatment. The following table shows the required values.

Treatment Step	Attribute	Value
Treatment Details	Channel	E-mail confirmation out
Channel Details, Associated Lists	Subscription List	Select a list
Content	Response Forms	Unsubscribe from list

Content and Attachments

To create your content, you can start with a blank page or use a template, and can upload content from your desktop. You can choose to work in HTML or plain text, or create both versions.

In the body of the e-mail, you can include text, merge fields, graphic links and response forms. If you have both plain text and HTML versions of the treatment, the MIME standard ensures delivery of the version appropriate to each recipient's e-mail client.

You can attach a file, a URL, or a text block, in addition to select product specific content, to the treatment.

Content, Treatments and Segments for a Global Campaign: Points to Consider

When creating campaigns that target multiple geographic regions, languages and currencies, consider what products to market, what languages to include, and how the campaigns will be fulfilled. This topic discusses the following points:

- Product eligibility
- Segments
- Treatments
- Multistage and mini campaigns

Determining Product Eligibility

You must select products that are applicable to each geographic area that you target with your global campaign.

Creating Segments

You can create segments that are filtered by language or by geography. Name your segments so that you can identify them by language when you add your audience to your marketing campaign. You can create segment trees to organize the segments.

Creating Treatments

If you have multiple language-specific segments, you must create a corresponding treatment or treatment template for each language. Name your treatments and treatment templates so that you can identify them by language when you add them to your marketing campaigns.

When creating your marketing message and choosing supporting product collateral, consider the following:

- Marketing message text
- Text, images and colors included in graphics
- Date and time formats
- Currency and local taxes
- Content of any collateral attached to the treatment
- Content of any web pages linked to the treatment

You must also verify that your third party fulfillment supplier can manage your language requirements.

Creating Campaigns

For multistage campaigns, you can create separate stages for each language, or create a single stage and use the allocation feature to associate language-specific treatments with the corresponding segments or segment trees.

For mini campaigns, which do not have allocation functionality, you must create a separate campaign for every region and language.

E-mail Campaign Content : Explained

To create the content of your e-mail campaign, you can add any combination of the elements that follow.

- Images
- Merge Fields
- Response Forms
- Standard, Dynamic, and Ad Hoc URLs
- Conditional Content
- Attachments

Images

Add graphic images to your e-mail. You can provide a link to an image already on a server, or choose a local file and upload it to the server. Specify the size and placement of the image.

Merge Fields

Personalize your e-mail message body by adding place holders from a list of merge fields, such as the recipient's first name. Merge fields are standard sets of attributes pertaining to an individual contact. You can insert them into your e-mail content. When you launch the campaign, merge fields are dynamically populated directly from the database.

The personalized text merge field, available only with sales campaigns, is the only exception. Rather than being populated from the database, you enter the content yourself. You can enter different text for every individual contact, to provide a personal touch to an otherwise generic collateral.

Response Forms

Insert response forms as active links in your e-mail content. When a contact clicks one of the links, a specific response is automatically generated. All such responses are gathered and monitored, to track contacts' actions.

Available response forms for marketing campaigns are:

- Forward to Friend
- Request Call Back
- Request More Information
- Subscription Confirmation Request
- Unsubscribe Confirmation Request
- Do Not Contact
- Request Unsubscribe from Many
- Subscribe to List
- Unsubscribe from List

Note

Only the first three response forms are available in a sales campaign.

Standard, Dynamic, and Ad Hoc URLs

You can add any of the following types of URL:

- Standard URLs are predefined and commonly used across the enterprise.
- A dynamic URL is a type of standard URL where content is inserted when the e-mail is sent.
- An Ad Hoc URL can be created when you define your e-mail content.

If you enable tracking, every time a contact clicks a link in a campaign e-mail, the click is recorded as a specific response, together with details pertaining to the URL.

Conditional Content

Conditional content is inserted or omitted based on the results of a rule. There are two elements that you can use to generate conditional content within an e-mail:

- If-Then-Else cases are used to determine if a block of text or HTML is removed from an outgoing e-mail, by verifying if a Merge field value is defined. The merge field is defined if it is NOT an empty string or, for numeric merge fields, if it is not a value of 0 (zero). If the merge field is defined, the block of text or HTML remains in the outgoing e-mail. If the merge field is not defined, the block of text or HTML is removed from the outgoing e-mail.
- Named Blocks are used to decide whether or not to insert a block of text or HTML into an outgoing e-mail, by comparing one string to another. If the two strings are identical, the block is inserted.

Attachments

To send documents, such as product literature, as e-mail attachments with your campaign, you can select a file from your own desktop; the file will be added to the content repository for use during delivery.

What's the difference between a seed list and a subscription list?

A seed list is a static list of contacts. There are two locations in the Treatment flow where you can associate a seed list with an e-mail treatment.

- If you make the association in the **Channel Details** view, the list is automatically added to the list of actual campaign members when the treatment is associated with a campaign stage and fulfilled as part of a campaign.

- If you make the association in the **Define Content** view, after selecting the **Send Test E-Mail to a List** action, you can use the seed list to test an e-mail treatment before you associate it with a campaign stage.

A subscription list is another type of static list. When associated with a specific treatment that has subscription response forms included in the treatment content, it will reflect the responses of campaign recipients who choose to subscribe.

You can design a campaign stage to increase the subscription list members, by adding the treatment and allocating it to audience segments or other lists, to target contacts, rather than adding the subscription list as an audience. Once ready to leverage the subscription list to target marketing material, you can associate it with both multistage campaigns and mini campaigns.

4

Design Marketing Campaigns

Manage Multiple-Stage, Multiple-Channel Marketing Campaigns

Campaign Dates: Explained

When you create a multistage campaign, there are three dates that appear on the overview page. When the campaign executes, further dates show the progress of the stages. This topic explains each of these dates.

The dates that appear on the overview page are as follows:

- Planned Start Date
- Execution Start Date
- Planned End Date

The Execution Results view shows the dates for every stage, including every iteration of repeating stages. In addition to the planned and actual start and end dates, two system generated dates appear for every stage:

- Load Date
- Launch Date

The five dates are described in the sections that follow.

Planned Start Date

The planned start date for a campaign is the day when the first step in the schedule of the first campaign stage will start. In order to start, the campaign must have a status of **Approved**. If the campaign is not approved by the planned start date, it will not start. If the campaign is approved after the start date, it will start immediately.

Execution Start Date

The execution start date is the date the campaign is activated.

Planned End Date

Enter this date when designing your stages, to indicate when you expect all iterations of all stages to have completed. If the campaign takes longer than expected, the date does not force an end to any ongoing activities.

Load and Launch Dates

After the campaign is approved and activated, these two system generated dates appear for each executed stage in the Execution Results view. They indicate when the predefined, mandatory Load and Launch tasks, respectively, completed for each stage.

Campaign Stage Design Elements: Explained

The campaign design interface provides the components you use to create stages and specify audiences, treatments, allocation, schedule, event details, additional options, and lead options. The elements available to specify for each stage are determined by the stage type you select.

Element	Interaction Stage	Event Stage	Advertising Stage	Lead Generation Stage
Audience	Yes			Segments and Segment Trees only
Treatments	Yes		Yes	
Allocations	Yes			
Schedule	Yes			
Event Details		Yes		
Additional Options	Yes			Yes
Lead Options				Yes

The standard design elements are described in the sections that follow.

Note

Since this campaign design functionality is extensible, your enterprise may have customized design elements that are different from the standard set. For example, your enterprise may add additional attributes to the Summary tab, or may add an Additional Attributes tab to capture more event attributes.

Audience

The audience collectively describes all the contacts you want to target in the campaign. Only Interaction and Lead Generation stages have audiences. For an Interaction stage, the audience can include any combination of segment trees, segments and lists. Once you launch the campaign, lists are expanded to show individual contacts. For a Lead Generation stage, the audience can include segment trees and segments, but not lists.

The **Quick Add Audience** list provides convenient access to the most widely used segments and lists. Because users can modify the set of segments and lists that appears in the Quick Add list, the list reflects changes made by you and also by other users.

Treatments

Treatment is a marketing term describing the content that is to be delivered to the target audience of a marketing campaign. Applicable to Interaction and Advertising stages, you can add any number of treatments from the stage action menu or from the Quick Add list. You and other users can modify the Quick Add Treatment list in the same manner as the Quick Add Audience list. If necessary, you can create new treatments to include in your campaign.

Allocations

Allocation describes the process of relating the selected audience members to the corresponding treatments, to determine what content each contact will receive.

Applicable to Interaction stages, the two available modes of allocation are **Simple** and **Advanced**.

- In Simple mode, you can only allocate 100 percent of the audience element, whether segment or list, to a treatment.
- In Advanced mode, you can allocate by count or by percentage, and you can allocate a specific count or percentage of audience members to a control group. The control group is a random sampling of contacts who will not receive the campaign marketing material. You can evaluate the effectiveness of the campaign by comparing responses from control group members to responses from contacts who received the marketing material. In order to have your supplier process the full volume of transactions, you allocate more than 100 percent of the audience. For example, if your supplier is to send 5000 e-mails, and you want a control group of 500, you would allocate 5500 audience members and specify the control group size. When the stage executes, 5500 audience members will be loaded, but 500 will be identified as control group members, and excluded from the launch.

Schedule

Applicable to Interaction stages, the schedule shows the start and end times of each system task that will be executed as part of the Load, List Export and Launch processes. By default, the Load, List Export and Launch processes run consecutively, each immediately following completion of its predecessor, on the date scheduled for the stage.

Optionally, you can enable manual tasks, which can be run by customized BPEL process. You can specify the duration of each process, and can request notification to the owner when it has completed. The dates of all subsequent steps are adjusted automatically to allow for the duration of added processes.

Event Details

Applicable to Event stages, you can choose from the list of event types, choose the venue, and optionally, add attachments.

Additional Options

Applicable to Interaction and Lead Generation stages, this page provides additional choices for loading audience segments and for lead generation processing.

Lead Options

For a Lead Generation stage, once you have added audience segments and trees, select the audiences from which leads are to be created. For each audience, select the source code, so that the resultant leads can be tracked back to the corresponding marketing activity.

Repeating Campaign Stages: Points to Consider

Within a single campaign, you can define stages that repeat on a daily, weekly or monthly basis for the duration you specify, and can funnel customers through stages that repeat at different intervals.

You can create and manage repeating stages with varying degrees of complexity, such as the following:

- Repeating a single stage
- Repeating two stages with simple funneling
- Repeating two stages with complex funneling
- Pausing a campaign with repeating stages

Repeating a Single Stage

You can create a very simple campaign to target customers who have bought a subscription to your ABC product, to remind them when their subscription is about to expire, and offer a discount if they choose to renew for a longer term.

Repeating Two Stages with Simple Funneling

Your campaign has two repeating stages:

- Stage One, which repeats monthly, looks for all customers who buy your ABC product, to send them an e-mail with a link to the online user forum for ABC product. Every time a user finds an answer from the forum, rather than making a support call, your company saves money.
- Stage Two, which repeats quarterly, is funneled from Stage One, and looks for all customers who accessed the online user forum, to send them an

offer to purchase one year of support for ABC product at a 50 percent discount.

When the first instance of Stage Two begins, Stage One has already repeated three times. All customers who were targeted in the first three instances of Stage One, and who subsequently visited the online forum, qualify for the discount offer, which is sent to them in the first instance of Stage Two.

When the second instance of Stage Two begins, Stage One has already repeated six times. The first instance of Stage Two has already targeted customers from the first three instances of Stage One. To ensure that no eligible customer gets a duplicate e-mail with the same discount offer, Stage Two must compute a segment which includes only those customers targeted in the last three instances of Stage One.

Repeating Two Stages with Complex Funneling

Again, your campaign has two repeating stages:

- Stage One, which repeats quarterly, targets customers who have attended your webinar during the last three months, and sends them a coupon that is valid for one year and which they can redeem online at any time within the year.
- Stage Two, which repeats monthly, is funneled from Stage One to find customers who redeemed their coupon online, plus those who also attended your webinar, and send them invitations to a company event, scheduled near their location, where they can share their experience with other customers from the same area.

Stage Two repeats frequently, to ensure that customers have the opportunity to attend an event soon after they purchase the product and redeem the coupon. The first instance of Stage Two starts soon after the first instance of Stage One, but Stage Two then repeats more frequently than Stage One.

When the third instance of Stage One begins, six instances of Stage Two have already occurred. When the seventh instance of Stage Two begins, it is not enough to target the same customers as in the second instance of Stage One, since there may be some customers who were targeted in the first instance of Stage One but who redeemed their coupons later.

It is therefore better to compute a segment for every instance of Stage Two that:

- includes all customers targeted in all previous instances of Stage One and
- excludes all customers targeted in all previous instances of Stage Two

In this way, all customers who were ever targeted by Stage One are considered for Stage Two, but no customer gets duplicate treatment for Stage Two.

Pausing a Campaign with Repeating Stages

If a campaign is paused, all repeating stages are skipped for the duration of the pause. When the dialog resumes after the pause, any repeating stages execute on their next scheduled occurrence.

Stage Schedule Automatic Tasks: Explained

You can monitor the execution status of all completed and active processes in your campaign, to check that the campaign stages are on track in terms of completion dates and times.

Campaign execution tasks are grouped in three categories:

- Load
- List Export
- Launch

Each category has a mandatory automatic task plus optional, configurable tasks.

Load

The load task uses segments or lists to build the audience of campaign members targeted in a particular stage. Every segment has an associated load format, that determines which campaign member attributes are to be loaded. Optionally, you can override this default format by selecting a different load format on the Additional Options tab.

You can tailor the load schedule by enabling optional tasks, either for manual intervention or for a custom action to be executed automatically. Once the load process completes successfully, you can view individual campaign members in the Campaign Execution details for the stage.

Note

All segments defined for a stage are loaded at the same time. If a stage has multiple extremely large segments, it will take longer to load. In such cases, you may want to create duplicate stages, and add only one large segment to each iteration, for faster processing.

List Export

The list export task takes the data from the load task, generates a text file of recipients, and uploads the file to the Universal Content Manager (UCM). The ID of this text file, together with the ID of the treatment stored in UCM, is made available to the supplier associated with the treatment, in the Launch task.

Launch

The launch task does the following:

- If the supplier is Oracle Fusion E-Mail and Web Marketing, the e-mails are delivered using the content and campaign member data uploaded in the List Export phase.

- For third party suppliers, the list of campaign members and content is delivered to them based on their distribution profile settings.

Campaign Stage Additional Options: Explained

Additional options are available for Interaction and Lead Generation campaign stages.

This page has the following fields.

- Purge Cache
- Allowable Error Count
- Original System Reference
- Load Format
- Duplicate Look Back Days

Purge Cache

During the load process, the campaign members for each stage are loaded into the database. For segments, the selected contacts are also stored in the segmentation cache. The segmentation cache is purged automatically 24 hours after loading, so there is no need to select this option if more than 24 hours have elapsed since the last load cycle.

Allowable Error Count

Applies only to Lead Generation stages. Specify the maximum number of errors to allow before stopping the lead import process and the corresponding execution of the stage.

Original System Reference

Applies only to Lead Generation stages. Provide a source reference for the newly imported records.

Load Format

Specify the path and file name to a new mapping that will override the default load format for all segments in the stage.

Duplicate Look Back Days

Applies only to Lead Generation stages. Specify the number of days in the immediate past that the import process will check for duplicates, when importing new leads.

Campaign Actions: Explained

The campaign actions provide control over campaign execution.

The following actions are available:

- Submit for Approval
- Withdraw Approval
- Activate
- Pause
- Resume
- Terminate
- Duplicate Stage
- Redesign

Submit for Approval

If campaign approval is enforced for your enterprise, you cannot launch a campaign until it is approved. When the planning and design are finished, and the design status is set to **Complete**, you can submit your campaign for approval. If ad hoc campaign approval is enabled for your enterprise, you can select from a list of resources eligible to approve your campaign, otherwise the first approver is your manager. While the campaign is awaiting approval, you cannot make further changes.

Note

If your organization has created a tailored workflow that permits making changes to the campaign in the interval between submission and approval, this option may be available to you.

The campaign approver can approve or reject the campaign. If a campaign is rejected, you can make changes and then resubmit it for approval.

Withdraw Approval

If, in the interval after you have submitted your campaign for approval but before your approver has reviewed it, you decide not to proceed with the campaign, you can select the **Withdraw Approval** action to remove it from your approver's task list.

Activate

Once the campaign is approved, it is automatically activated. If approval is not enforced, you can activate the campaign yourself by changing the status to

Active. Once activated, the first stage begins according to the stage schedule. If your campaign has a stage with a fixed date, but the campaign is not approved by that date, the stage will not execute. You cannot make changes to an active campaign unless you pause it.

Pause and Resume

If you want to adjust the design, you must pause the campaign. You can then make your changes, and, when they are complete, resume the campaign. Your changes will only affect stages scheduled to start after you resume the campaign. While a campaign is paused, no repeating stages will execute. If a stage has a fixed date that occurs while the campaign is paused, that stage will not execute. Once the campaign resumes, repeating stages will execute at the next scheduled time.

You can also pause and resume the campaign without making changes, for example, to check that the campaign is still within budget.

Note

Some processes, such as sending a batch of e-mails, cannot be paused once they have begun.

Terminate

To end campaign execution after the current stage has completed, select **Terminate**. A terminated campaign cannot be resumed, but can be reactivated.

Duplicate Stage

If your campaign will have two or more stages that are largely similar, you can save time by creating the first iteration of the stage, and then using it as a template by selecting **Duplicate Stage** to create a copy of it.

Redesign

If changes are necessary, you can pause, redesign and resume a campaign, or you can terminate, redesign and activate a campaign. If approval is enforced, you must request approval for the redesigned campaign.

Campaign Approval Processing: How It Works

This topic explains the profile options, resources, and statuses involved in the approval process.

Settings That Affect Campaign Approval

There are three profile options that affect campaign approval:

- **Enforce Campaign Approval Enabled** determines whether or not you must request and obtain approval for your campaigns before you can activate them.
- **Ad Hoc Campaign Approval Enabled** determines whether you can select a specific approver from within your management hierarchy, or if your campaigns automatically go to your direct manager for approval.
- **Approval Timeout Interval** determines the number of days after which approval requests automatically time out.

As campaign owner, you provide a completed campaign plan and design. Valid campaign approval statuses are:

- Draft
- Submitted
- Approved
- Rejected
- Expired

The following table shows the statuses and how they affect the campaign:

Overall State	Campaign Approval Status	Campaign Execution Status	Edit Plan Without Re-approval?	Edit Design Without Re-approval?
Before submitting approval request	Draft	Draft	Yes	Yes
Pending Approval	Submitted	Draft	No	No
Post-Approval, Pre-Execution	Approved	Draft	No	No
Post-Approval, Execution	Approved	New, In Progress, Completed	No	No

How Campaign Approval Works

Only the campaign owner can request approval, and the campaign design status must first be **Complete**. After the campaign is submitted for approval, the status is updated to **Submitted**. This prevents further changes.

The following pre-approval checks are applied automatically when you submit a campaign for approval.

1. The treatment start and end dates must be within the planned start and end date of the stage.
2. The required launch interval is evaluated based on the supplier capacity limits set in the supplier profile for this treatment and the audience count allocated to the treatment. This must be less than or equal to the duration specified for the post-launch activity in the Stage schedule.
3. If a promotion is associated with the treatment, the effective start and end dates of the promotion must overlap with the treatment duration. If there

is only a partial overlap, you will receive an e-mail notification warning you of the situation.

4. The products associated with all the treatments in a stage must be checked to ensure that the segment definitions do not violate any of the nonavailability rules for the products on offer.

The approval worklist tracks campaign approval status, showing the date of each entry and any comments. You can sign in to review the status.

When you submit a campaign for approval, an e-mail notification is automatically sent to your approval resource. When the campaign is approved, an e-mail notification is automatically sent to you, and the approval status is changed to Approved. If the campaign is rejected, or if it times out, an e-mail notification is automatically sent to you. The approval worklist tracks all changes in campaign approval status. You can click an item in the worklist to drill down on the details and, if authorized, you can click a button to approve or reject it.

FAQs for Multiple-Stage, Multiple-Channel Marketing Campaigns

What happens if I create a campaign from a template or an existing campaign?

Most planning and design attributes are copied. When creating from a previous campaign or from a template, the following elements are copied:

- Attachments
- Stages
- Audiences associated with stages
- Treatments associated with stages

When creating a campaign from a template, the following additional elements are copied:

- Tasks from any task template associated with the campaign template

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Note

It is the task template, rather than the campaign template, that determines which tasks are added to your copy. If the task template has changed since the campaign template was created, the tasks in your copy may not match those in the original.

The following elements are not copied:

- Campaign team
- Notes
- Allocations
- Schedules

What happens to existing campaigns if I update the campaign template?

Existing campaigns that were created from the template are unaffected. Your changes will only affect campaigns created after the template is updated.

Campaign templates provide models to use as a basis when planning and designing multistage campaigns. When you use a template to create a multistage campaign, the template values are copied to the new campaign and the template's purpose then ends for that campaign.

How can I change the quick add list when designing multistage campaigns?

The **Quick Add** lists contain collections of favorite treatments and audiences. The lists reflect the most recent changes, as users add and remove items. In the contextual area, click the **Edit List** link below the Quick Add list you want to change. A window opens, showing all the items available for that list. You can select one or more items and use the arrow buttons to move your selection into or out of the Quick Add list.

What's the difference between updating the count and refreshing the allocation?

Updating the count recalculates the number of members in segments and segment trees. This is useful when the segment rules have been changed, or if you are revisiting the campaign design after an interval where many more contacts may have been added to the segment.

Refreshing the allocation recalculates the matrix where audience members are allocated to treatments. You can refresh your allocation of numbers or of percentages, or you can change between numbers and percentages.

What's a campaign stage custom action?

A custom action is a BPEL workflow that your enterprise has created and registered, to extend the automated load capabilities and extend or replace the automated launch capabilities of an interaction stage in a multistage campaign. During campaign design, you can optionally select custom actions when you schedule the execution activities for the stage.

What happens if I select the notify option for a stage schedule activity?

When the activity completes, or if it encounters an error condition, an e-mail notification is sent to the owner named for this step in the schedule.

What happens if I deselect the Enforce Approvals check box after campaign approval has started?

While approval is pending, a campaign cannot be changed. If you have authority to deselect Enforce Approvals, and decide that you do not want to seek approval for your campaign, you must first withdraw the approval request.

Campaign approval is enabled by a profile option. If approval is enforced, you must obtain approval before the campaign can be activated. You can override the requirement for mandatory approval only if you have the marketing vice president role.

Can I submit a campaign for approval more than once?

Yes. If your approval request expires, or if you choose to withdraw it before it is approved, you can resubmit the approval request for the campaign with or without changes. If your approval request is rejected, you can make changes and then resubmit it.

How can I update campaign members before launching my multistage campaign?

The list of campaign members is generated during the load process. If you include a manual step to inspect data after the load process has completed, then you can preview and update campaign members before the campaign launch.

Manage Single-Channel Marketing Campaigns

E-mail Campaign Content : Explained

To create the content of your e-mail campaign, you can add any combination of the elements that follow.

- Images
- Merge Fields
- Response Forms
- Standard, Dynamic, and Ad Hoc URLs
- Conditional Content
- Attachments

Images

Add graphic images to your e-mail. You can provide a link to an image already on a server, or choose a local file and upload it to the server. Specify the size and placement of the image.

Merge Fields

Personalize your e-mail message body by adding place holders from a list of merge fields, such as the recipient's first name. Merge fields are standard sets of attributes pertaining to an individual contact. You can insert them into your e-mail content. When you launch the campaign, merge fields are dynamically populated directly from the database.

The personalized text merge field, available only with sales campaigns, is the only exception. Rather than being populated from the database, you enter the content yourself. You can enter different text for every individual contact, to provide a personal touch to an otherwise generic collateral.

Response Forms

Insert response forms as active links in your e-mail content. When a contact clicks one of the links, a specific response is automatically generated. All such responses are gathered and monitored, to track contacts' actions.

Available response forms for marketing campaigns are:

- Forward to Friend
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- Unsubscribe Confirmation Request
- Do Not Contact
- Request Unsubscribe from Many
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Note

Only the first three response forms are available in a sales campaign.

Standard, Dynamic, and Ad Hoc URLs

You can add any of the following types of URL:

- Standard URLs are predefined and commonly used across the enterprise.
- A dynamic URL is a type of standard URL where content is inserted when the e-mail is sent.
- An Ad Hoc URL can be created when you define your e-mail content.

If you enable tracking, every time a contact clicks a link in a campaign e-mail, the click is recorded as a specific response, together with details pertaining to the URL.

Conditional Content

Conditional content is inserted or omitted based on the results of a rule. There are two elements that you can use to generate conditional content within an e-mail:

- If-Then-Else cases are used to determine if a block of text or HTML is removed from an outgoing e-mail, by verifying if a Merge field value is defined. The merge field is defined if it is NOT an empty string or, for numeric merge fields, if it is not a value of 0 (zero). If the merge field is defined, the block of text or HTML remains in the outgoing e-mail. If the merge field is not defined, the block of text or HTML is removed from the outgoing e-mail.
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Attachments

To send documents, such as product literature, as e-mail attachments with your campaign, you can select a file from your own desktop; the file will be added to the content repository for use during delivery.

Define Sales Campaigns

Refining Target Contacts for a Sales Campaign: Examples

To create and refine the list of target contacts for your sales campaign, you include contacts from a previous campaign, select and add further contacts from your customer repository, and use filtering to remove some contacts. The following scenarios illustrate the process.

Selecting contacts from a previous campaign

Last quarter, you created a campaign to tell your contacts about your Winter catalog. Now you want to update them about the Spring catalog. To select contacts from the Winter catalog campaign, select the **Add from Previous Campaigns** action. You can search for previous campaigns by name or by date. When you find the campaign, you can choose to add all the contacts, or select any subset.

Selecting contacts from the customer repository

You have made new contacts since last quarter, plus you have a number of existing contacts that you did not include in the Winter catalog campaign, but want to include in the Spring catalog. These contacts do not belong to any single group, so you select them from the customer repository.

To search for contacts, select the **Add from Customer Repository** action. You can use the advanced search criteria to refine your selection.

Filtering contacts from a sales campaign

After reviewing the contacts you have added to the campaign, you decide to remove contacts that do not have the authority to influence a decision. To identify them, select No in the **Influencer** filter, then select and delete the returned rows. To view the remaining contacts, who are influencers, reset the Influencer filter to Yes.

Contacts without e-mail addresses and contacts with restrictions are automatically excluded when your campaign is launched, even if they appear in the list of contacts. If you prefer to remove them from the list, use the **E-Mail Address** filter and the **Restrictions** filter to identify them, then select and delete the returned rows. Click the **Reset** icon, to the right of the filters, to clear the filters and select the remaining contacts.

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Add graphic images to your e-mail. You can provide a link to an image already on a server, or choose a local file and upload it to the server. Specify the size and placement of the image.

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Conditional Content

Conditional content is inserted or omitted based on the results of a rule. There are two elements that you can use to generate conditional content within an e-mail:

- If-Then-Else cases are used to determine if a block of text or HTML is removed from an outgoing e-mail, by verifying if a Merge field value is defined. The merge field is defined if it is NOT an empty string or, for numeric merge fields, if it is not a value of 0 (zero). If the merge field is defined, the block of text or HTML remains in the outgoing e-mail. If the merge field is not defined, the block of text or HTML is removed from the outgoing e-mail.
- Named Blocks are used to decide whether or not to insert a block of text or HTML into an outgoing e-mail, by comparing one string to another. If the two strings are identical, the block is inserted.

Attachments

To send documents, such as product literature, as e-mail attachments with your campaign, you can select a file from your own desktop; the file will be added to the content repository for use during delivery.

Adding Personalized Text in an E-Mail Campaign: Example

You are creating an e-mail campaign inviting contacts to an event that your company will host next month. You already have a template that provides most of the information.

In addition to standard merge fields that will automatically populate contact data, you want to add a more personal touch, for a selected few contacts, to the otherwise generic e-mail content.

Adding Personalized Text

1. Create a campaign, enter the details, select all the contacts for the campaign (not just the ones to whom you will send a personalized message) and, optionally, choose a template.
2. When you edit the e-mail content, add the personalized text merge field where you want the personalized text to appear.
3. When you enter advanced options, locate the contact for whom you want to create a personal text in the list of contacts. Click the edit icon in the Personalize column to open a new HTML editor window where you can enter a message for the selected contact. You can apply styles just as in the common area of the e-mail. You can preview and edit the personal message until you have what you want. You can repeat this step to create individual personal messages for as many contacts as you choose.

Follow-up Actions: How They Work

When you create a sales campaign, you may want to be notified automatically when a targeted contact responds in a specific way. You can associate follow-up actions with specific responses, so that the follow-up action is triggered automatically when a contact responds to your campaign e-mail.

Response Form

You can include response forms in the content of your campaign. These appear to recipients as hyperlinks that they can click within the e-mail. Every click is recorded, and used to track usage statistics. In addition, each response can also trigger an associated action to be performed automatically.

Follow-up Action

Follow-up actions are predefined actions that can be triggered by contacts' responses. The purpose of these actions is to inform you, the creator of the campaign, when a particular contact clicks a specific response. You can choose to receive this information in an e-mail notification that will appear in your e-mail Inbox, or by the creation of a callback activity that will appear in your worklist. In either case, the information you receive includes campaign details, contact details, the specific response that the contact clicked, and the date and time of that click.

FAQs for Sales Campaigns

Why is the total customer count in my sales campaign less than I expect?

Sales campaigns target individual contacts for selected customers. If you initiate a campaign from the **Identify Sales Targets** view, any customers who were selected, but have no contacts defined, are excluded from the sales campaign. Once a contact is defined for the customer, you can manually add the contact to the campaign.

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Launch Campaigns

Campaign Dates: Explained

When you create a multistage campaign, there are three dates that appear on the overview page. When the campaign executes, further dates show the progress of the stages. This topic explains each of these dates.

The dates that appear on the overview page are as follows:

- Planned Start Date
- Execution Start Date
- Planned End Date

The Execution Results view shows the dates for every stage, including every iteration of repeating stages. In addition to the planned and actual start and end dates, two system generated dates appear for every stage:

- Load Date
- Launch Date

The five dates are described in the sections that follow.

Planned Start Date

The planned start date for a campaign is the day when the first step in the schedule of the first campaign stage will start. In order to start, the campaign must have a status of **Approved**. If the campaign is not approved by the planned start date, it will not start. If the campaign is approved after the start date, it will start immediately.

Execution Start Date

The execution start date is the date the campaign is activated.

Planned End Date

Enter this date when designing your stages, to indicate when you expect all iterations of all stages to have completed. If the campaign takes longer than expected, the date does not force an end to any ongoing activities.

Load and Launch Dates

After the campaign is approved and activated, these two system generated dates appear for each executed stage in the Execution Results view. They indicate when the predefined, mandatory Load and Launch tasks, respectively, completed for each stage.

FAQs for Launch Campaigns

What's a campaign stage custom action?

A custom action is a BPEL workflow that your enterprise has created and registered, to extend the automated load capabilities and extend or replace the automated launch capabilities of an interaction stage in a multistage campaign. During campaign design, you can optionally select custom actions when you schedule the execution activities for the stage.

Why didn't execution processing start for a stage?

A stage in your campaign can fail to start for any of the following reasons.

- The campaign was not approved until after the stage start date.
- Approval was not enforced for the campaign, but the campaign was not activated before the campaign start date.
- The campaign member count exceeded the capacity for the third party supplier.

6

Manage Responses

Import Responses

Import Activity Source File Options: Explained

The Import Activity consists of a step by step guided process to assist you with creating an import activity for a given object.

This topic describes the source file options defined in the Import Activity that are used by the import process to locate and parse the source file data.

Source File Data

Enter attribute details pertaining to the source file as follows:

Option	Description
File Type	Source file must be either Text or XML.
Data Type, Delimiter, and Header Row Included	A Text file type can further be defined based on how the data is delimited and if the source file is expected to include a row of headings for each column.
Import Mapping	Displays a list of predefined mappings for the object selected for this import activity. The selected mapping will be used as the basis for mapping your source file in the next Import Activity step.

Source File Location

The following outlines the options that are available to you when locating your source file for import.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>File Selection</td><td>Select from the following file selections:
Specific file

Enables you to upload a specific source file from a local file system, such as your desktop, a URL address, or from a network path. A file name is required for this option.
Most recent file

Enables you to schedule repeating import activities without having to select a new file every time. This selection is only available when you select Network from the Upload From options.

You need to copy the new file to the specified network path for repeating import activities. You do not need to enter a file name for this option and can only upload your source file from a network path. The asterisk wildcard is supported for multiple characters. The question mark wildcard is supported for a single character.</td></tr>
<tr><td>Upload From</td><td>You can upload the source file from three locations:
Desktop
URL
Network
If you select Desktop, a File Name field with an associated Update button is displayed. Click Update and browse to search for and select the file you want to upload.

If you select URL, enter the address location as in the following example format: <code>http://www.example.com/</code>

If you select Network, enter the file name path as in the following example format: <code>\ComputerName\SharedFolder\Resource\</code>

Note

If you selected the Specific File as your file selection option, then you will have to include the file name for both URL and Network file path locations.</td></tr>
</table>

Import Activity Attachment Options: Explained

Many objects can have multiple documents attached to it. The File Import Activity process allows you to import the documents attached to a specific object.

In the Summary section enter an import activity name and description and the primary object for which you want to import data from a source file. The list of objects displayed is controlled by your data security privileges. This topic describes how to define the attachment options pertaining to the import activity.

Attachments

As part of the file attachment import process setup, you must:

- Provide the relationship between the attachment file or files and the object in the source file with multiple columns each referencing a file name pertaining to the attachment.
- Provide file names in the source file columns for attachment corresponding to each object record (row)
- Select all the files associated with all the objects targeted in the current file import activity process
- Map the columns related to file names to specific object and attribute pertaining to the common attachment interface such as category, file name, file title and file description
- Monitor the process for uploading attachments that is activated as part of the file import activity process

Selecting Documents

You define the parameters for the import activity to include the primary object for which the data is included in the source file. If the object being imported has attachments, you will need perform an additional step of selecting documents that serve as attachments for each record being imported in the Attachments section. Select the **Multiple Files** option and then click on **Browse** to display the Universal Content Manager (UCM). From here you can select individual documents that serve as attachments or a single file that contains all these documents as follows:

- Select a pre-configured compressed file in Zip or Jar format that contains all the individual attachment documents. If the compressed file contains hierarchy of folders then the attachment import process will traverse through the hierarchy to search for specific file name.
- Select individual attachment documents which UCM automatically compresses into a Zip format. In this case, the individual document cannot be a compressed file.

Browse through the file system and select multiples files from across various folders. You must select all attachments in one operation. For example, you cannot select a few files now and then return later to select more attachments files.

Import Activity Import Options: Explained

The File Import Activity consists of a step by step guided process to assist you with creating an import activity for a given object.

This topic describes the import options defined in the Import Activity that are used by the import process to interpret source file data and import interface table data into the target application tables.

Source File Data Transformation

The following options are used to identify the formatting of source file data so the data can be correctly interpreted and transformed by the import process:

Option	Description
Decimal Separator	The format of the fractional portion of numerical values in columns mapped to attributes with a decimal attribute type.
Date Format	The format for values in columns mapped to attributes with a date attribute type.
Time Stamp Format	The format for values in columns mapped to attributes with a time stamp attribute type.
File Encoding	The overall encoding of the characters within the file.

Interface to Target Import Options

The following options are used when importing the interface table information to the target application tables:

Option	Description
Import Mode	Determines if the Import Activity process should create new records or update existing records. If updating existing records, the record IDs must be provided in the source file. If an existing record is not found, a new record is created. Update mode is not supported for all import objects. Consequently, the **Import Mode** is set to **Create** and is not updatable for those objects. If creating new records, the import process evaluates the data in the interface tables with existing objects in the target application tables for possible duplicates. Customer Data Management objects are evaluated using the rules defined in the set of Matching Configurations. All other objects are evaluated using the combination of attributes selected for duplicate validation in the predefined Import Mapping.
Allowable Error Count	An error count above the threshold will stop the import process for all records. If the error count is below the threshold, records without errors are imported. In either case, records with errors will be reported in the Error and Exception files. Validation errors include: • Missing required values • Values that exceed the attribute length • Invalid identifiers and lookup codes • Duplicates to existing records in the destination tables based on the combination of attributes selected for duplicate validation in the predefined Import Mapping Duplicates found using matching configurations for Customer Data Management objects do not contribute to the error count.

Notification E-Mail	The e-mail of the intended recipient of import processing notifications.
Customer Data Management Duplicates	Consumer, customer, and legal entity objects imported by themselves or as components of another object are subject to duplicate verification. The duplicates are determined using the following matching configurations: • Batch Location Basic Duplicate Identification • Batch Person Basic Duplicate Identification • Batch Organization Basic Duplicate Identification You can select from one of the following: • Do Not Import Duplicate Records If the main object of the Import Activity is a consumer, customer, or a legal entity object, rows that are matched to existing records will not be imported. These duplicates records are reported in the Exception and Error reports. If the Customer Data Management objects are components of another object and one or more matches are found, the existing duplicate records are evaluated to determine the most recent record. The most recent record will be associated with the main object being imported. For example, when importing a marketing response object, the consumer object is also a component of the response. If the consumer is matched to an existing record, the consumer in the interface tables is not imported. However, the response object will import and the most recent existing consumer record will be associated to the response. • Import Duplicate Records The Customer Data Management objects will be imported even if matched records exist. • Import Duplicate Records and Create Resolution Request The Customer Data Management objects will be imported even if matched records exist. In addition, a duplicate resolution request is created and displayed in the Customer Data Management, Duplicate Resolution work area.

Duplicate Look Back Days	This option applies only to the Lead import object. Only existing leads created within the period determined by the look back days value are evaluated for duplicates based on the attributes selected for duplicate validation in the predefined import mapping. If a duplicate is found, the lead will not be imported and the duplicate record will be reported on the Exception report. Duplicate leads are included in the calculation of the allowable error count threshold.

Import Activity Field Mapping: Explained

After entering your import options, the second step of the import activity process is to map fields in the source file to the corresponding target attributes.

This topic explains:

- Map Fields
- Saving the Import Mapping
- Constant Values

Map Fields

The Map Fields section can be subdivided into source file columns and target attribute columns.

The source column header value is derived from one of the following:

- Predefined mapping, if one is selected
- The source file, if the **Header Row Included** option is selected in the first step of the Import Activity definition (for Text file type only)
- Generic values of Column A, Column B, and so on, if the **Header Row Included** option is not selected (for Text file type only)
- XML tagging structure (for XML file type only)

The following table outlines the source columns:

Source Column	Description
Column Header	Represents the column header for Text file types and the tagging structure for XML file types.
Example Value	Values are derived from the first source file saved with the predefined mapping. If you did not select a predefined mapping, the example values are taken from the first data row in the source file selected in the first step of the Import Activity definition.
Ignore	Select this option if you do not want to import the source file data in that column.

The following table outlines the target columns:

Target Column	Description
Object	The group of import objects that represent the components of the business object being imported.
Attribute	The attribute name that represents the corresponding interface table column for the object.

Saving the Import Mapping

The mapping between source file information and target attributes is saved as a reusable mapping when the Import Activity is saved, using the import activity name and date to derive a mapping name. If you selected a predefined mapping, modifications made in the Import Activity to an unlocked mapping will update and save to the predefined mapping. If the predefined mapping is locked, a modified mapping will be saved as a new mapping. To specify a mapping name for new mappings, select the **Save As** option from the Map Fields **Actions** menu.

Constant Values

Constant values provide a way to specify a value for a target attribute that all imported objects will inherit. For example, if a source file does not contain a column for business unit and all of the objects in the file belong to the same business unit, enter a constant value for the object and business unit attribute.

Managing File-Based Import Exceptions: Worked Example

This example demonstrates how to resolve errors found in source file data used for importing into interface tables and destination application tables.

The following table summarizes key decisions for this scenario:

Decisions to Consider	In This Example
Should the errors be corrected and submitted again for import?	Yes, for an invalid value error. No, for a duplicate record found.
Is the Import Activity processing source files on a repeating schedule?	Yes. An Import Activity is defined to process a new source file weekly. A second Import Activity is defined to process corrections to errors in the weekly file.

1. Review the Import Activity status and reports.
2. Correct the exception file data and save to your desktop.
3. Import the file with the corrected data.

Prerequisites

1. Create a mapping between the source file columns and the import object attributes by navigating to the Import Mappings page from the Manage File Import Mappings task in Functional Setup Manager. The mapping includes a combination of fields with **Duplicate Validation** selected to compare source file records and existing records for duplicates during import processing.
2. Create an Import Activity using the mapping. Since you expect a source file on a weekly basis, you select Latest File for the **File Selection** and URL for the **Upload From** choice. Specify a **URL** value. Define a repeating schedule to repeat once a week. Click **Activate** to save and activate the Import Activity.
3. Create a second Import Activity to use when importing exceptions found in the weekly import file. All settings are the same as the weekly Import

Activity with the exception of the Source File Import Options and the Schedule. Since this is only for exception handling, you select Specific File for the **File Selection** and Desktop for the **Upload From** choice. Click **Save** to save the Import Activity but not to activate it.

Review the Import Activity status and reports

1. Navigate to the Manage Import Activities page from the Tasks region of your work area or Functional Setup Manager task to view the import status.
2. Click on the **Status** hyperlink for the import activity to navigate to the View Import Status page.
3. Open the exception and error files by navigating to the Files Processed section, **Attachment** column, and clicking on the file names.
4. Review the errors file for details on each error and determine the action to take. In this example, a record in the source file failed the duplicate validation. You verify that the source file record is a duplicate to an existing record and determine the source file record should not be imported. A second record failed due to an invalid date and should be corrected and imported.

Correct the exception file data and save to your desktop

1. With the exception file still open, locate the record with the invalid date and delete all other records. Locate and correct the invalid date value. Save the file to your desktop.

Import the file with the corrected data

1. From the View Import Status page click **Cancel** to return to the Manage Import Activities page.
2. Select the Import Activity that you defined for exception handling and click the **Edit** icon.
3. Navigate to the **File Name** in the Import Options, Source File region and click **Update**, and then click **Browse** to search and select the file with the corrected data that you saved to your desktop.
4. Click **Next** until you are viewing the Review and Activate page. Click **Activate** to save and activate the Import Activity.

FAQs for Import Responses

What happens if I add a marketing list in the Import Activity definition?

File-based data import enables you to record consumers and organization contacts in a marketing list when importing consumer, lead, and response import objects. Select an existing list or create a new one. A marketing list is assigned the list type value of Imported if created while defining an import activity. After the objects are imported successfully, the consumers and contacts are added as members of the marketing list.

What happens if I inactivate an Import Activity?

The Import Activity will not stop the currently running process. However, it will stop the next process that has not started plus any future repeating file import activities. You can always activate the process at a later stage.

FAQs for Manage Responses

What's the difference between response, lead, and opportunity?

The following table describes the main differences between a response, a lead, and an opportunity.

A response is ...	A lead is ...	An opportunity is ...
An interaction initiated by the customer in response to a marketing stimulus. Every outbound marketing activity is a marketing stimulus.	An inquiry, referral, or other information, obtained through marketing campaigns or other means, that identifies a potential contact or prospect and specific purchase interest. **Note** A lead can also be created even if the specific purchase interest is not known at the time of lead creation. However, for this lead to get qualified, it is necessary to record a primary purchase interest.	A pending sale of a product or service that can be forecasted and tracked using summary data such as potential revenue, sales stage, win probability, and expected close date.
Created from interest recorded from responders in response to marketing activities. Responses include providing answers to phone survey questions, subscribing to a list, replying to an e-mail response form request, and so on. As interest for the product or service matures, responders are elevated as leads.	Mostly created by automated lead capture or lead import processes which periodically create qualified responders as sales leads. Sometimes created from the response data of a contact or prospect who has expressed a need or interest in a product or service offered by the business.	Created by salespersons when they have identified a qualified lead with a potential revenue opportunity. Leads are converted to opportunities when significant sales investment is foreseen to close the deal. **Note** A salesperson can create opportunities from scratch, without previously having a response or lead created.
Solely owned by Marketing. Not included as part of the sales forecast.	Transferred between Marketing and Sales departments based on how the lead progresses through its lifecycle. Not included as part of the sales forecast.	Solely owned by Sales who have complete responsibility for managing the lifecycle of an opportunity. Included in the sales forecast at the discretion of the salesperson. Not all opportunities get included in the sales forecast and the decision to include them in the forecast may depend on your company's requirements.

What's the difference between response and interaction?

In the context of marketing, a response signifies a recorded reaction of a prospect or contact to a marketing activity. An interaction is a record of communication between your company and the prospect or contact or customer.

The following table outlines the key points about responses and interactions:

Responses	Interactions
A marketing response can be converted into a sales lead for further qualification or sales opportunity to be pursued and included in sales forecasting.	An interaction is recorded when a communication occurs with customer contacts by means of any communication channel such as e-mail, phone, direct mail, or web.
Responses received by phone, e-mail, or web are saved and positive responses can be converted to sales leads and opportunities.	An interaction is typically created for each outbound as well as inbound communication. An outbound communication is initiated by a company employee such as a salesperson by a phone call, or marketing manager by means of an e-mail campaign. An in inbound communication is initiated by a prospect or contact by means of web activity or through a call center.
Responses are typically captured by automated system processes or are imported in the system.	Interactions for a particular customer or contact can be viewed in Customer Center.
A response captures information specific to the marketing activity such as marketing source codes and specific destination URLs.	The channel details on a marketing treatment include the option to create interactions when a response is created.

What happens when I convert a response to a lead?

A lead is created and becomes available for follow up from the Leads List view. As the user who converted the response to the lead, you are listed as the lead owner.

Glossary

BPEL

Business Process Execution Language; a standard language for defining how to send XML messages to remote services, manipulate XML data structures, receive XML messages asynchronously from remote services, manage events and exceptions, define parallel sequences of execution, and undo parts of processes when exceptions occur.

confirm subscribe request

A marketing response form that can be inserted into an e-mail. When e-mail recipients click the link, a second e-mail is sent, requesting them to confirm their intent to subscribe to a list.

confirm unsubscribe request

A marketing response form that can be inserted into an e-mail. When e-mail recipients click the link, a second e-mail is sent, requesting them to confirm their intent to unsubscribe from a list.

heat map

A graphical representation of data where the values taken by a variable in a two-dimensional map are represented as colors. Darker color shades indicate highest potential revenue based on analysis criteria.

marketing list

A static selection of contacts for the purpose of communicating a marketing message by e-mail, direct mail or phone.

mini campaign

A simplified single stage communication platform that allows a marketer to interact with customers by e-mail or SMS.

multistage campaign

An integrated multichannel communication platform, that allows a marketer to achieve a specific marketing goal or objective through customer interaction, strategic advertisements and lead generation.

one click unsubscribe

A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to remove themselves from the subscription list associated with a marketing treatment.

request call back

A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to request a call back.

request unsubscribe from many

A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to remove themselves from the subscription list associated with a marketing treatment.

subscribe to list

A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to add themselves to the subscription list associated with a marketing treatment.

treatment

A marketing term that represents a combination of a marketing message for targeted audience members and delivery options for third party suppliers.

unsubscribe from list

A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to remove themselves from the subscription list associated with a marketing treatment.